

## DATABASE E-MAIL PUBLISHING – A CASE STUDY

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*If organizations want to compete successfully for customers' attention, they must find a way to filter information for them. The DMA's MyDMA newsletter delivers information unique to each subscriber using Database Publishing.*

**T**here was a time when simply getting information was difficult. People spent a lot of time just gathering it. Things like wall painting, clay tablets, books, newspapers and television all made information a little more available. Today, the issue is not just getting information; it is getting the right information at the right time. We are inundated with more information than we can use. Customers are busy people. If organizations want to compete successfully for their attention, they must find a way to filter and organize that information for them.

With that in mind, the Direct Marketing Association ([www.the-dma.org](http://www.the-dma.org)) has created an informational e-mail called [MyDMA](#). This newsletter, with more than 50,000 subscribers, is created specifically for each customer based on the information the customer has asked for. They can change their mind whenever they want, and we will create a different newsletter for them. They can choose how often they want the information and change their mind about that, too.

Because the newsletter is tailored to the customer, the retention rate for MyDMA is high. The newsletter is three years old. Over that time, we have had an unsubscribe rate of about 0.1%. The subscription rate, however, currently averages 2,000 subscribers per month.

You might think sending out 50,000 substantially different newsletters would require a substantial staff. You would need the editors, the graphic artists, the HTML code writers, the deployment staff, etc. In fact, the newsletter is fully automated. It is created for each customer and sent without requiring any staff at all to compile or send it. We do need to create the content, but for the most part we do not need to create content specifically for the newsletter.

What makes this all possible is Database Publishing. Using MyDMA as an example, I will explain how database publishing can be used to leverage content and create a flexible and robust e-mail product. MyDMA is an informational newsletter. However, the same concepts can be applied to promotional e-mails.

### Personalization

Basic database publishing can be described as “personalization.” For example, you can include the customer’s name in the newsletter, or other demographic information you may have about them. An example might be “Dear David, we see you have a birthday

coming up.” In this case, the name of the recipient and their birth date are stored in your database. The line can be added to Dave’s e-mail as it is sent to him in a process like the mail merge of many word processing programs.

Personalization is a common practice and still one of the most cost-effective. It is the simplest form of database e-mail publishing and often the entry point for an organization.

But you can do more. This will take you beyond personalization and into an area called “customization.” Customization is the focus of this article.

## **Using Databases to Store Content**

To do customization, you will first need to store your content in a database. The MyDMA newsletter is constructed using several content areas. These include news, events, job listings, case studies etc. (The customer can select which of these areas to view, target that information and select how they want it formatted, but we’ll get to that later).

The information for each of these areas is composed of several elements, or information “chunks”, which are stored in the database. For the News section, we store the title, a begin and end date, a summary paragraph, and the body of each news article separately. For the Events section, we store the event name, its dates, its location, pricing, etc. The information that needs to be stored separately will vary with the type of content and the audience. For example, if you were providing legal case information, you might need to provide a field for the citation in addition to the body copy.

The fields you need also depend on how you want to present the information. For example, we do not store separate author information for our news articles because we do not ever display that information separate from the body of the article. We do store a summary paragraph because in the newsletter we only display the article title (which is linked to the full story on our Web site) and the summary.

News is displayed in the Newsstand section of the DMA Web site. Here we display an index page of news articles that are less than seven days old. That list is comprised of several fields from the database: The article title, the date and the summary paragraph. The customer can click on an article title to view the full article. (We call this method of organizing information “list and profile.”) The article page (the profile) contains the article title again, the date, and the body of the article. It also contains links to related articles. These related links are simply article titles that link to other article profiles. (More on how we determine what’s related later). Related news titles also appear in other sections of the site. For example, they appear in connection with related books or related events. All this information comes from the same place in the database. Change an article title once in the database, and it changes everywhere.

We use the same news information stored for the Web site in the MyDMA newsletter. In our case, we have elected to present the news article title, the date, and the summary in the newsletter. The subscriber clicks on the article title to see the article profile on the

DMA Web site. We could just as well have elected only to present the article title or add the full story. (Or we could have the customer make that election, but that also will be discussed later).

The news is an example of one content area. When we have new case studies, research or regulatory documents we add them to the “What’s New” database. These appear in the corresponding sections of MyDMA and the Web site. The DMA has an online yellow pages of DM suppliers. When a new supplier is added to the database, we present the company’s information in the newsletter, on our Web site, and in a printed directory that is produced annually.

Database publishing allows great flexibility in what information to present. Once the key information elements in our news database were selected, we could choose when, where and how to present that content. We can publish it to many places having only written it once. It doesn’t matter whether that content appears on our Web site, is sent to our printer, or appears in the MyDMA newsletter. This saves tremendous staff time and substantially reduces the number of copy errors and discrepancies that often come with publishing the same material across multiple channels.

### **Selecting and Sending Information Automatically**

We have automated the sending of our newsletter so our staff is not required to compile or send it. It just happens at the appointed time.

To select which articles to present in the MyDMA newsletter, we look at the news article date and the date the newsletter is to be sent. We select all the news articles in the database that we haven’t sent the customer already and that are active at the time the newsletter is sent. Again, all this information resides in the database. This allows us to automatically choose the news items for a given edition of the newsletter.

We’ve also automated the formatting of the newsletter. This formatting is determined by template and requires no staff to create it every time the newsletter is sent. For example, the news title is always in bold directly above the summary. The news articles are always contained within a table with a colored heading.

By having automated the content selection and sending of the MyDMA e-mail, we do not need to tightly tie the timing of the content creation process to its propagation. We enter information into our database as we receive or create it. This saves us considerable coordination effort in addition to the staff time for compiling and sending the MyDMA newsletter.

But you can do more...

## Using Dates to Allow Frequency Choices

Most newsletters are sent when the publisher decides it should be sent. This could be monthly, weekly or whatever the publisher feels is appropriate to their content and corporate resources. However, all customers don't have the same needs. Some may want the information daily because they are highly involved with the information. Others may need the information less frequently and may find a daily newsletter intrusive while finding a monthly one useful.

Because we have automated the sending of our MyDMA newsletter, it is a simple task to publish the content on multiple schedules. We send it to our customers weekly, monthly or daily. We simply record the customer's preference in our database. A weekly subscriber will receive the content in seven-day chunks. A monthly subscriber will see the same information in thirty-day chunks.

But you can do much more...

## Targeting Content by Demographics

As we have seen above, we can automatically deliver content to the customer on a schedule they choose. You can also target that content to individual customers. This means potentially creating a unique e-mail for every customer.

At The DMA, we track both customer and product information by several different demographic pieces of information provided by our customers. These include interest areas (i.e., finance, lead generation, postal, etc.), job function ( i.e., list management, international marketing, etc.), title level and industry segment (i.e., catalog, teleservices, etc.). When we add content such as news or events to our database, we also "tag" that content by those demographic fields. If we believe a news article is of particular interest to catalogers, for example, we tag that article with the segment element for catalogers. If we feel it is also of particular interest to customers with an interest in postal issues, we tag that content with that interest in the database.

When we send our MyDMA newsletter, we can then target the information contained in each content area using those tags. If a customer tells us he only wants to see information related to Internet catalogers and postal regulation, that's what the customer gets. We have discussed selecting content based on date. This simply uses additional criteria to select the content for each content area when the e-mail is compiled for a customer.

In addition, The DMA can make newsletter content available only to DMA members. We know who our members are and can use that status as criteria for including members-only information or excluding it for non-member customers.

This "content-based" filtering works by analyzing the content to identify a set of key attributes and then filling in the attribute values. We use our demographic fields, but you could use other attributes. For example, banks will often classify their customers by asset

value. Their sites could identify content to use in the preferential treatment of customers based on their account class.

To match information to customers, you need to segment your customers into groups. You can define groups based any number of criteria. For example, if you have developed a customer model, you can use the groups defined by that model. What you use depends, in part, on what you want to do with your targeting. We elected to use our demographic groups because that is how we define which services we promote to our customers.

Once you have decided your groups, you need to decide the rules to make the match between the content and the customer. Because we have used the same variables for both our content tagging and our customers, we could use an exact match rule. For example we match a document with an interest area of telemarketing with a customer whose interest area is telemarketing. This keeps the rule simple. Your matching rule can be more complex if you need to.

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We use tagging in other ways as well. Earlier, we mentioned that we present links to related news articles, events, and books in context on the Web site. We do this by matching the interest area field of the content with the interest areas of other content. If a news article is tagged with an interest area of postal, we present related news articles, books, and events that are also tagged with that interest area. On the DMA Web site we organize information of interest to various industries. We present content tagged with those industry segment elements on special industry “home” pages. For example, we have a home page for Catalogers where we have collected much of our information that is of special interest to catalogers.

Creating the relationship between the content and the customer requires care. You should use the same fields and field elements to track your customers and your information products. Having to map your tagging to inconsistent fields in the customer and product areas will enormously complicate your task. In addition, the staff doing the tagging must be familiar with the information (the article or event in our case) as well as the industry. It requires intelligence. Ill-considered matching creates poor results for your customers. The benefits of targeted content will depend on the quality of your tagging in the same way the benefits of direct marketing depend on good targeting. We have built in statistical reports of click-through and other indicators to provide staff with customer responses to their selections. Over time, this “closed-loop” information helps staff refine their choices.

But you can do even more...

## **Allowing the Customer to Choose**

We could have simply sent the customer targeted information based on their demographics. Instead, we allow the customers to choose. This puts the newsletter in their control. It also allows us greater flexibility in providing choices to the customer, choices we could not reasonably make on their behalf.

This is done in combination with The DMA Web site. To subscribe to the newsletter, customers must obtain a Web site account. When the customer signs onto the site they have access to a number of online forms that provide options for customizing their MyDMA newsletter. Those preferences are stored with their customer record in the database. They can change those preferences as often as they like without DMA staff intervention.

First, we allow customers to choose from eight content areas. They can include news, events, job listings, or industry services, for example, or any combination of those areas. Further, customers can select the order in which those areas appear in the newsletter. For example, one customer might want to see the events section at the top of their newsletter. Another customer could elect to see news first. We have two sections that are not optional. These are The DMA messages section (which we will discuss later) and the paid sponsorship section.

Within each content area we allow subscribers to target their content and select display options. For example, the customer can target events displayed by interest area, industry segment and location while job listings can be targeted by job category and location. Different display options are also available for each section. For example, in the DMA Announcements section, subscribers can choose to display an announcement summary or just a link to the full announcement. For the Service Locator section they can choose to display just the company name with a link to a full company profile or include a company description in their newsletter.

We also allow customers to select online how often they want the newsletter.

Not all subscribers customize their newsletter, although many do. We have set up defaults for all our content options. To establish those defaults, we look at the most common options that have been chosen by subscribers. As those commonly chosen options change over time, we can change the defaults for new subscribers.

But you can still do more...

## **Targeted Messages and Reminders**

The DMA is a membership organization whose membership is quite diverse in its concerns and interests. Through the MyDMA newsletter, we can communicate to those different groups using targeted messages. We can add one or more messages (including images and links) and target that message to our customers' demographics. For example,

if we have a legislative alert about legislation that affects members in Florida, we can have that message display to members located in Florida but not other states.

We add the message to the database, identify the targeting and add a date range. Targeted messages can be added to many pages on the Web site. The MyDMA newsletter is treated simply as another page. When the newsletter is sent, messages within the appropriate date range are automatically added for subscribers who meet the targeting criteria.

“Reminders” is a service we offer to customers both on the Web site and in the newsletter. Customers add important events through an online form on the DMA Web site and we display those event reminders at the appropriate time in the newsletter. For example, customers can add their spouse’s birthday. We can also allow customers to select various “DMA reminders” to add to their events. These are reminders the DMA set up. For example, if a customer regularly purchases one of DMA’s statistical reports, we can remind him when that report next becomes available for purchase.

Yes, there *is* more that can be done...

## **Suggesting Content**

When targeting content, we rely on the DMA staff to make decisions about what content meets the customer’s requested targeting. This is rather like a librarian recommending various books when you ask for information about Celtic history, for example, or the Knicks. Success depends on the customer request as well as the skill of the librarian. It does not provide the customer with information they may not know to ask for. With ever-increasing amounts of information, organizations will need to find a way to suggest such content. We are currently exploring how this might be done in a cost-effective manner.

For customers with a Web account, we know the demographics for those customers and can track top pages by those demographics. (We track information in aggregate and do not see what individuals look at). It is possible to use that information to “suggest” Web site content based on a customer’s demographics.

If this sound like a classic direct marketing problem, it is. First you must identify the significant demographic variable or combination of variables using your favorite analysis method (i.e., CHAD). With this, you build your model. You can then apply this model to match your customers with your content, creating a list of pages viewed by similar customers. Weight the variables and applying a ranking grid to “suggest” pages based on customers’ activities with a similar profile. The ranking is done using a concept called “Euclidian distance,” or nearest neighbor, to analyze the score of a page and whether to recommend it given the demographics of the customer.

It can be a time-consuming process to build a model. However, your model will not change much, probably in the two- to three-year range at most, so you will not need to do

it often. Your company may have already developed a useful customer model. You will probably not need to change your content ranking more than once a month and that can be automated, reducing the staff time required to maintain it.

While not as sophisticated as some of the current artificial intelligence applications used for personalization, it is achievable and can use your company's existing marketing expertise and customer models.

### **To Subscribe to the MyDMA Newsletter**

You can see an example of MyDMA newsletter online or subscribe and see how it works. The newsletter is available to both Direct Marketing Association members and non-members. Simply go to <http://www.the-dma.org/aboutdma/mydmanewsletter.shtml>.

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